

REASON FOR THIS POSITION		
1. NEW <input type="checkbox"/>	2. IDENTICAL ADDITION TO THE ESTABLISHED PD NUMBER (8) <input type="checkbox"/>	3. REPLACES PD NUMBER (8) <input type="checkbox"/>

**POSITION DESCRIPTION
COVER SHEET**

PD # W04765

RECOMMENDED

4. TITLE Management Analyst (Records)	5. PAY PLAN (2) GS	6. SERIES (4) 343	7. GRADE (2) 09
8. WORKING TITLE (Optional)		9. INCUMBENT (Optional)	

OFFICIAL

10. TITLE Management Analyst (Records)						
11. PP (2) GS	12. SERIES (4) 343	13. FUNC.(2)	14. GRADE(2) 09	15. DATE (mm/dd/yyyy) 07/12/04	16. I/A <input type="checkbox"/> yes <input checked="" type="checkbox"/> No	17. CLASSIFIER (Name) Wm. Scott Fox

18. ORGANIZATIONAL STRUCTURE (Agency/Bureau)

1st U.S. Department of Housing and Urban Development	5th
2nd Assistant Secretary for Housing - FHC	6th
3rd DAS for Affordable Housing Preservation	7th
4th Washington DC Preservation Office	8th

SUPERVISOR'S CERTIFICATION

I certify that this is an accurate statement of the major duties and responsibilities of the position and its organizational relationships and that the position is necessary to carry out Government functions for which I am responsible. This certification is made with the knowledge that this information is to be used for statutory purposes relating to appointment and payment of public funds and that false or misleading statements may constitute violations of such statute or their implementing regulations.

19. SUPERVISOR'S SIGNATURE	20. DATE (mm/dd/yyyy)	22. SECOND LEVEL SUPERVISOR'S SIGNATURE	23. DATE (mm/dd/yyyy)
21. SUPERVISOR'S NAME	24. SECOND LEVEL SUPERVISOR'S NAME Sean G. Cassidy		
21a. SUPERVISOR'S TITLE	24a. SECOND LEVEL SUPERVISOR'S TITLE General Deputy Assistant Secretary for Housing		

FACTOR EVALUATION SYSTEM

FACTOR	25. FLD/BMK	26. POINTS	FACTOR	25. FLD/BMK	26. POINTS	
1. Knowledge Required	1-6	950	6. Personal Contacts	6-2	25	
2. Supervisory Controls	2-3	275	7. Purpose of Contacts	7-2	50	
3. Guidelines	3-3	275	8. Physical Demands	8-1	5	
4. Complexity	4-3	150	9. Work Environment	9-1	5	
5. Scope and Effect	5-3	150	TOTAL POINTS		1885	
					GRADE	09

CLASSIFICATION CERTIFICATION

I certify that this position has been classified as required by Title 5, U.S. Code, in conformance with standards published by the OPM or, if no published standard applies directly, consistently with most applicable published standards.

29. SIGNATURE Wm Scott Fox	30. DATE (mm/dd/yyyy) 07/12/04
31. NAME Wm. Scott Fox	31a. TITLE Human Resources Specialist
REMARKS FLSA Exempt, FPL GS-11	33. OPM CERTIFICATION NUMBER

MASTER RECORD / INDIVIDUAL POSITION DATA

THIS SIDE TO BE COMPLETED BY THE CLASSIFIER

A KEY DATA

ACTION (1) A/C/D/W	2. DEPT. CD./AGCY-BUR-CD. (4) HU83	3. SON (4) 4400	4. MR. No. (6) 1004765	5. GRADE (2) 09	6. IP NUMBER (8) 00094126
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B. MASTER RECORD

1. PAY PLAN (2) GS	2. OCC. SER. (4) 343	3. OCC. FUNC. CD (2)	4. OFF. TITLE CD (6) 9999	5. OFF. TITLE (38) Management Analyst (Records)					
6. HQ. FLD. CD (1) 1 = HQ 2 = FLD 1		7. SUP. CD. (1) 8		8. CLASS. STD. CD. (1) X = New Std. Applied Blank = NA X		9. INTERDIS. CD (1) N = No Y = Interdis. N		10. DATE CLASS (mm/dd/yyyy) 07/12/04	
11. EARLY RET. CD. (1) 1 = Primary 2 = Secondary			12. INACT/ACT (1) A = Active A		13. DATE ABOL. (mm/dd/yyyy)		14. DATE INACT/REACT (mm/dd/yyyy)		15. AGCY. USE (10)
16. INTERDIS. SER. (40)									
17. INTERDIS. TITLE CD. (50)									

C. INDIVIDUAL POSITION

1. FLSA CD. (1) E = Exempt N = Nonexempt E		2. FIN. DIS. REQ. (2) ON		3. POS. SCHED. (1) A = Sched A B = Sched B C = Sched C		4. POS. SENS (3) 1NU		5. COMP. LVL. (4) 9999							
6. WK. TITLE CD. (4)		7. WK. TITLE (38)													
*G. STR. CD. (18) (example *83 - 07 - 01 - 0200 - 08 - 19 - 00 - 00*)						9. VAC. REV. CD. (1)									
st 83	2nd 11	3rd 13	4th 2500	5th 04	6th	7th	8th	0 = Position Action No Vacancy A = No Change		B = Lower Grade C = Higher Grade		D = Different title and/or Series E = New Position/New FTE			
10. TARGET GC. (2) 11		11. LANG. REQ. (2)		12. PROJ. DTY IND. (1) N		13. DUTY STATION (9) State (2) City (4) County (3) 11 0010 001		14. BUS. CD. (4) 0015	15. DATE LAST AUDIT. (mm/dd/yyyy) 07/12/04	16. PAS. IND. (1) Blank = NA 1 = PAS		17. DATE EST. (mm/dd/yyyy) 07/12/04			
18. GD. BASIS. IND. (1) 1 = Rev. when vacant 2 = Impact of Person 3 = Sup/SGEG						4 = Sup./Program 5 = RGE 6 = Policy Analysis GEG		7 = Equipment Development Guide 8 = Agency Use 9 = Agency Use ALPHAS = Agency Use		19. DATE REQ.REC. (mm/dd/yyyy)		20. NTE. DATE (mm/dd/yyyy)	21. POS. ST. BUD (1) Y = Perm N = Other		
22. MAINT.REV./CLASS.ACT.CD. (2) (1st Digit = Activity and 2nd Digit = Results)										5 = Series Change 6 = Pos. Upgrade 7 = Pos. Downgrade 8 = New Pos.				9 = Other	
3		Normal Act 1 = Desk Audit 2 = Sup. Audit 3 = Paper Rev. 4 = PME/Activity Rev.		Maintenance Review Act 5 = Desk Audit 6 = Sup. Audit 7 = Paper Rev. 8 = Panel Rev.		3		Results 1 = No Action Req. 2 = Minor PD Change 3 = New PD Req. 4 = Title Change							
23. DATE EMP. ASGN. (mm/dd/yyyy)		24. DATE ABOL. (mm/dd/yyyy)		25. INACT/ACT (1) A 1 = Inact. 2 = Act.		26. DATE INACT/ACT (mm/dd/yyyy)		27. ACCTG. STAT. (4) 0001		28. INT. ASGN.SER. (4)		29. AGCY USE (8)			
30. CLASSIFIER'S SIGNATURE										31. DATE (mm/dd/yyyy) 07/12/04					

32. REMARKS

OFFICE OF AFFORDABLE HOUSING PRESERVATION

TITLE: Management Analyst (Records), GS-0343-09

LOCATION: Washington DC Preservation Office, Office of Affordable Housing Preservation (OAHP), A/S for Housing, Washington DC

INTRODUCTION:

The Office of Affordable Housing Preservation (OAHP) is located in the Office of Housing and is responsible for the preservation of affordable housing supported, insured or assisted by HUD and other Federal entities. Preservation efforts will include the development and execution of restructuring agreements for affordable housing projects with FHA-insured mortgages, supported by Section 8 assistance. It will also include the financial and physical restructuring of affordable housing and other like projects in which HUD has an interest, to improve their long term viability, and the recapitalization of other multifamily and single family housing including those in other Federal affordable housing programs as requested and required by Federal rules and legislation. Many of OAHP's efforts effect the preservation of housing through oversight, monitoring, and evaluation of processes and procedures carried out by third parties such as Participating Administrative Entities (PAEs) who are responsible for the initial evaluation, as assigned by OAHP, of affordable housing and like projects with the purpose of proposing plans to OAHP and other stakeholders for long term preservation. In addition, OAHP will undertake other preservation responsibilities as assigned through the Office of Housing, to include current preservation programs as appropriate as well as development of new programs to address identified needs in projects or portfolios in which HUD has an interest, in keeping with the Department's commitment to preservation. In conducting the business of preservation of affordable housing, OAHP is responsible for ensuring compliance with relevant laws and statutes.

The incumbent serves as a Management Analyst in the Washington DC Preservation Office, Office of Affordable Housing Preservation (OAHP). This position has the responsibility for planning, reviewing, analyzing, coordinating, interpreting, applying, and making recommendations on matters relating to Participating Administrative Entities (PAEs) and other like entities in the performance of their duties in repositioning market rents, underwriting, and debt restructuring recommendations. In performing these duties, the incumbent considers decisions, policy determinations, agency regulations and guidelines, agency goals and objectives, delegations of authority specific to the PAE and consistent with OAHP guidance and congressional mandates.

Major Duties and Responsibilities

The incumbent provides Program support and assistance to facilitate in the analysis and development of policy, procedures, instructions, legislation and research and performs the following specific functions:

- Sets up folders and maintains files.
- Develops data in order to produce reports for management. Collects data from staff members of various OAHP organizations as well as other HUD organizations.
- Analyzes reported data to ensure that it is suitable for management use.
- Develops procedures and systems for establishing, operating, and assessing the effectiveness of control systems such as those designed to prevent waste, loss, unauthorized use, or misappropriation of assets.
- Ensures that reports developed are adequate for management purposes.
- Identifies data required for use in the management and direction of current programs and other preservation programs and activities assigned to or undertaken by OAHP.
- Provides support to all levels staff in the performance of their duties.
- Researches and provides answers to routine inquiries from employees and managers.
- Conducts records management surveys and/or special studies to ensure essential records are created, eliminated and/or preserved. Dispose promptly and systematically of records of temporary value after they serve their purpose.
- Performs special searches for records, which required knowledge and understanding of the filing classification system.

Factors

1. Knowledge Required by the Position

- Knowledge of the procedures and requirements of the HUD Records Disposition Schedule and the General Records Disposition Schedule.
- Knowledge of microcomputer applications to input data and retrieve appropriate automated reports.
- Ability to proofread documents.
- Knowledge of administrative policies and procedures.
- Knowledge and skills in the use of microcomputers:
- Considerable skill in presenting accurate findings and a high degree of ability to make feasible and responsive recommendations both orally and in writing.
- Ability to design and maintain filing system.

2. Supervisory Controls

The incumbent works under the general supervision of the Preservation Office Director. The supervisor sets the overall objectives applicable to assigned programs and defines the financial and other management resources available to achieve the expected results. Performs duties and responsibilities with independence, receiving minimal supervision from the Director.

3. Guidelines

Guidelines include very broad and complex policy directives and regulations.

Manuals, internal guidelines, and directives on administrative policy are available for reference but are stated in general terms.

The incumbent is required to use resourcefulness, initiative, and seasoned judgment. This level may include responsibility for development of new material for use OAHP-wide, or to supplement and explain existing OAHP guidelines.

4. Complexity

The work is technical in nature and requires independent coordination of tasks due to the volume of assignments and tight time constraints with which the incumbent is restricted in order to accomplish tasks. Assignments are highly sensitive and confidential and cross various organizations and/or groups.

5. Scope and Effect

The incumbent's approach, technique, and effectiveness in completing assignments will have a direct impact on the overall operation of OAHP employees, and the overall operation of current preservation programs as well as other preservation programs and activities assigned to or undertaken by OAHP. The work involves developing criteria, procedures and instructions, planning and reviewing services on wide-ranging projects, programs and functions pertaining to PAEs in OAHP's restructuring program. Conformance with OAHP's regulations pertaining to their participation in the restructuring program, and interest to the general public, affordable and conventional housing groups and the mortgage finance industry. Incumbent must be willing to adapt self to changing duties; must exercise a high degree of judgment, tact, diplomacy, and must be able to work with employees at all levels.

6. Personal Contacts

The incumbent will have substantial contact with supervisors and employees from other offices, as well as within HUD and with outside contractors, PAEs and the general public.

7. Purpose of Contacts

Contacts are for the purpose of coordinating, directing or advising on technical office procedures or to provide and obtain information, to discuss problems, to request or require that work be done, to persuade individuals to a course of action, or to answer questions.

8. Physical Demands

Lifting of individual or boxed files and bending to obtain files from cabinets.

9. Work Environment

Work will be performed in a typical office environment.

**POSITION CLASSIFICATION
EVALUATION STATEMENT**

POSITION: Management Analyst, GS-0343-09

ORGANIZATIONAL LOCATION: A/S for Housing
Office of Affordable Housing Preservation
(OAHP) Washington DC Preservation
Office

INCUMBENT: VACANT

REFERENCE: OPM PCS for Management and Program
Analysis Series, GS-0343, TS-98, August
1990

OPM Administrative analysis Grade
Evaluation Guide, TS-98, August 1990

BACKGROUND: This position description is written to provide a Management Analyst in the Affordable Housing Preservation Office (OAHP) to accomplish efforts in oversight, monitoring, and evaluation of processes and procedures carried out by third parties.

TITLE/SERIES DETERMINATION: The primary purpose of this position is to accomplish planning, reviewing, analyzing, coordinating, interpreting, applying, and making recommendations on matters relating to participating Administrative Entities (PAEs). Monitors PAEs duty performance in repositioning market rents, underwriting, and debt restructuring recommendations. Analyzes reported data to ensure it is suitable for management use. Develops procedures and systems for establishing, operating, and assessing the effectiveness of control systems such as those designed to prevent waste, loss, unauthorized use, or misappropriation of assets. Provides support to all levels of staff in the performance of their duties. Researches and provides answers to routine inquires from employees and managers. Conducts records management surveys and/or special studies to ensure essential records are created, eliminated and/or preserved. Performs special searches for records, which require knowledge and understanding of the filing classification system. The Analyst considers decisions, policy determinations, agency regulations and guidelines, agency goals and objectives, delegations of authority specific to the PAE and consistent with OAHP guidance and congressional mandates. Positions requiring knowledge of: the substantive nature of agency programs activities; agency missions, policies, and objectives; management principles and processes; and the analytical and evaluative methods and techniques for assessing program development or execution and improving organizational effectiveness and efficiency are included in the Management and Program Analysis Series, GS-0343. Nonsupervisory positions primarily concerned with analyzing, evaluating, and/or improving the efficiency of internal administrative operations, organizations, or management is titled Management Analyst.

GRADE LEVEL DETERMINATION: The grade level of this position is evaluated by application of the nine evaluation factors in the Administrative Analysis Grade Evaluation Guide.

Factor 1, Knowledge Required by the Position Level 1-6 950 points

At Level 1-6, positions require knowledge of management principles, organizational theory, and techniques of analysis and evaluation, along with knowledge of standardized administrative practices and procedures to conduct studies of clerical work processes in various organizations to identify, analyze, and recommend solutions to problems in organizational structure, staffing, administrative procedures, work processes, or workload distribution. Knowledge of administrative regulations and operating procedures plus skill in applying fact-finding and investigative techniques (e.g., employee/supervisor interviews, review of work procedures, instructions, records, and files) to gather clear-cut factual evidence of administrative waste and abuse, or compliance with regulations.

The level of knowledge required to perform the duties of the subject are similar to that described above. The incumbent of this position provides accomplish planning, reviewing, analyzing, coordinating, interpreting, applying, and making recommendations on matters relating to participating Administrative Entities (PAEs). Monitors PAEs duty performance in repositioning market rents, underwriting, and debt restructuring recommendations. Analyzes reported data to ensure it is suitable for management use. Develops procedures and systems for establishing, operating, and assessing the effectiveness of control systems such as those designed to prevent waste, loss, unauthorized use, or misappropriation of assets. Level 1-6 is assigned

Factor 2, Supervisory Controls Level 2-3 275 points

The supervisor assigns specific projects in terms of issues, organizations, functions, or work processes to be studied and sets the deadlines for completing the work. The supervisor or a higher-grade analyst provides assistance on controversial issues or on the application of qualitative or quantitative analytical methods to the study of subjects for which precedent studies are not available. The employee plans and carries out successive steps in fact-finding and analysis of issues necessary to complete each phase of assigned projects. Work problems are normally resolved without reference to supervisor. Work is reviewed for conformance with overall project objective. Level 2-3 is assigned.

Factor 3, Guidelines Level 3-3 275 points

Guidelines consist of standard reference materials, texts, and manuals covering the application of analytical methods and techniques (statistical, descriptive or evaluative) and instructions and manuals covering the subjects involved such as organizations, equipment, procedures, policies, and regulations). The analytical methods contained in the guidelines are not always directly applicable to specific work assignments. However, precedent studies of similar subjects are available for reference. The employee uses judgment in choosing, interpreting, or adapting available guidelines to specific issues or subjects studied. This position meets level 3-3 where guidelines typically include agency

policy and precedents. Manuals and internal guidelines and directives on administrative policy are available for reference. Level 3-3 is assigned

Factor 4, Complexity **Level 4-3** **150 points**

The incumbent performs work involving problems and relationships of a procedural nature rather than the substance of work operations, issues, or other subjects studied. At level 4-3 the employee analyzes the issues in the assignment, then selects and applies accepted analytical techniques. This position is similar to level 4-3 where the incumbent uses knowledge of administrative regulations and operating procedures plus skill in applying fact-finding and investigative techniques (e.g., employee/supervisor interviews, review of work procedures, instructions, records, and files) to gather clear-cut factual evidence of administrative waste and abuse, or compliance with regulations. Level 4-3 is assigned.

Factor 5, Scope and Effect **Level 5-3** **150 points**

The incumbent is involved with developing procedures and instructions, planning and reviewing services on wide-ranging projects, programs and functions pertaining to PAEs in OAHF's restructuring program. At level 5-3, the purpose of the work is to plan and carry out projects to improve the efficiency and productivity of organizations and employees in administrative support activities. Employees at this level identify, analyze, and make recommendations to resolve conventional problems and situations in work flow, work distribution, internal administrative operations of the organization and activities studied. Level 5-3 is assigned

Factor 6, Personal Contacts **Level 2**

Personal contacts are with employee's individuals or groups within and outside the employing agency in moderately unstructured settings. The contacts are not routine, the purpose and extent of each is different, and they are identified and developed during the course of contact. Typical contacts are with other offices within HUD, and with outside contractors, PAE's and the general public. Level 2 is assigned.

Factor 7, Purpose of Contacts **Level B** **75 points**

The purpose of incumbents contacts are to coordinate, direct or advise on technical office procedures or to provide and obtain information to discuss problems, to request or require that work be done, to persuade individuals to a course of action, or answer questions. Level B is assigned.

Factor 8, Physical Demands **Level 8-1** **5 points**

The work is primarily sedentary although some slight physical effort may be required. Level 8-1 is assigned.

Factor 9, Work Environment

Level 9-1

5 points

The work is usually performed in an adequately lighted and climate controlled office. May require occasional travel. Level 9-1 is assigned.

Total

1885 points

FINAL DETERMINATION: A total of 1885 points falls in the range of 1855-2100 points for conversion to GS-09. This position is correctly classified as Management Analyst, GS-0343-09.